View in browser

FinancialPlanning

Wealthtech Weekly

January 22, 2026

By Rob Burgess
Reporter

With the advent of AI summaries and chatbots making no-click internet search a reality, how do advisors cut through to prospects and clients? Panelists on last week's Shaping Wealth Advisory Board webinar agreed that the most effective strategy is sharpening the focus to advisors' exact target audience. Meanwhile, generalists risk getting drowned out.

Have you had success micro-targeting your marketing? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

Advisors who market to everyone may connect with no one

Thursday's Shaping Wealth Advisor Board webinar explored how advisors can sharpen the focus of their messaging and content to resonate with clients and prospects.

- **Tech missteps can sink succession plans**
  Advisors who seek a smooth transition should take a hard look at their data and tech stack before any succession planning begins, experts say.
- **Inside Eric Clarke's vision for AI in advisor compliance**
  The former CEO of Orion Advisor Solutions has since become involved in several artificial intelligence startups, which he hopes will be integrated into advisor technology stacks.

- **Parental leave stress-tests a practice. Here's how advisors make it work**
  Clear and early communication, with coworkers as well as clients, is key when planning for a long leave.
- **Crypto caution: Advisors pulling back as bitcoin whipsaws**
  The recent fall in the price of bitcoin and other cryptocurrencies is likely to blame, experts say, but don't expect that decrease to continue forever.

Read the latest in Wealthtech

You're receiving this email because you signed up for Editorial emails from Financial Planning.

To update the emails you want to receive, or to unsubscribe from our mailing list, please visit our Email Preference Center.

arizent

Arizent
360 Madison Avenue, 8th Floor
New York, NY 10017

About | Subscriptions | Contact | Privacy Policy

Have questions or concerns? Contact Support

Follow us in real time: